

TM-3 TRAVELER COURSE

USING NASA'S TRAVEL MANAGER SYSTEM

CREATE A TRAVEL AUTHORIZATION ITINERARY

This document covers the steps for the Traveler to create an Authorization Itinerary. The Authorization will be completed by the Preparer.

Trip Information

1. Itinerary

Attend a Travel Manager meeting in Washington, DC, from June 30th to July 6th, leaving from home and returning home.

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A. CREATE A NEW DOCUMENT

1. Click the **Create a New Document** link on the Document Processing Toolbar on the left side of the page. The **New Document** page will be displayed, as shown below.

3. Select **Authorizations** from the **Document Type** pull down list.

4. Click in the **Document Name** field and enter a name consisting of


Center ID (example: 24), hyphen (-)

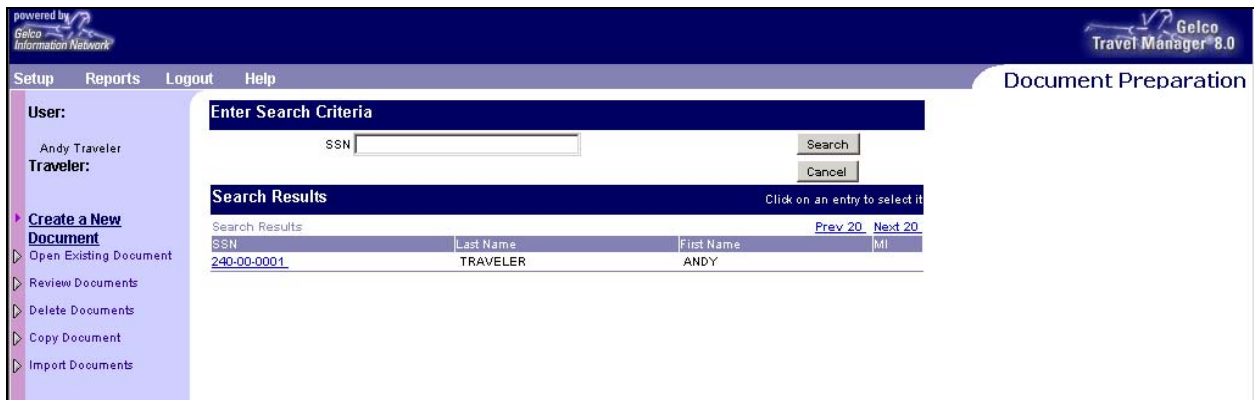
Org Code (example: XX (2 characters))

Date of departure (example: 063002 (MM-DD-YY))

Traveler's initials (example: XXX (2-3 initials))

A total of 14 characters can be entered. Example: **24-XX032602JD**.

- Click the **SSN Search** or **Name Search** icon  to retrieve the Traveler's record. The **User Search Criteria** page is displayed.



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Setup Reports Logout Help

Document Preparation

User: Andy Traveler
Traveler:

Enter Search Criteria

SSN Search Cancel

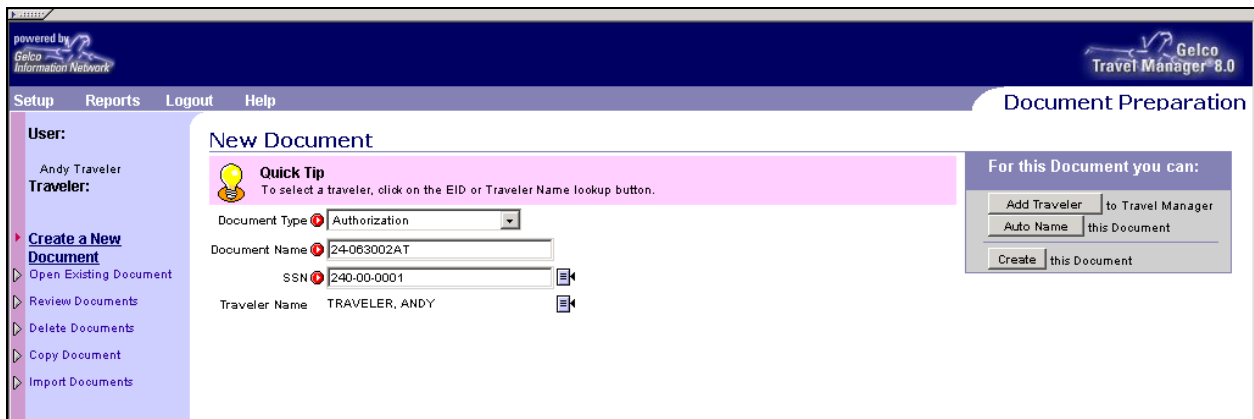
Search Results Click on an entry to select it

SSN	Last Name	First Name	MI
240-00-0001	TRAVELER	ANDY	

Prev 20 Next 20

Create a New Document
Open Existing Document
Review Documents
Delete Documents
Copy Document
Import Documents

- Click on the **SSN** link of the Traveler's record at the bottom under the **Search Results** area.
- The **New Document** page is displayed again with the selected Traveler's SSN and Name fields filled.



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Setup Reports Logout Help

Document Preparation

User: Andy Traveler
Traveler:

New Document

Quick Tip
To select a traveler, click on the EID or Traveler Name lookup button.

Document Type: Authorization
Document Name: 24-063002AT
SSN: 240-00-0001
Traveler Name: TRAVELER, ANDY

For this Document you can:

Add Traveler to Travel Manager
Auto Name this Document
Create this Document

Create a New Document
Open Existing Document
Review Documents
Delete Documents
Copy Document
Import Documents

- Click the **Create this Document** button in the 'For this Document you can:' area in the top right. The **Itinerary** page will be displayed.

B. ITINERARY

1. Click the **Itinerary** link on the Document Processing Toolbar on the left side of the page. The **Itinerary** page will be displayed.

The screenshot shows the 'Itinerary Information for 24-063002AT' page. On the left is a navigation menu with options like 'Document Summary', 'Traveler', 'Itinerary' (selected), 'Ticketed Trans', 'Expenses', 'Lodging/M&IE', 'Accounting', 'Totals', 'Comments', 'Document Status', 'Perform Pre-Audits', 'Preview Document', 'Export Document', and 'Close Document'. The main content area has a 'Quick Tip' box stating: 'The Begin Travel and End Travel fields must be completed before a per diem location can be added. Remember to save your itinerary before continuing.' Below this are sections for 'Trip Information' (with fields for Travel Authorization Number, Purpose, Description, Auth Date, Type, and Trip No.), 'Departure and Return Information' (with fields for Begin/End Travel, Depart/Return, and Trip Duration), and 'Per Diem Locations' (with a checkbox to replace ALL lodging and M&IE information and an 'Add Location' button).


2. Select **Presentation** from the **Purpose** pull down list.

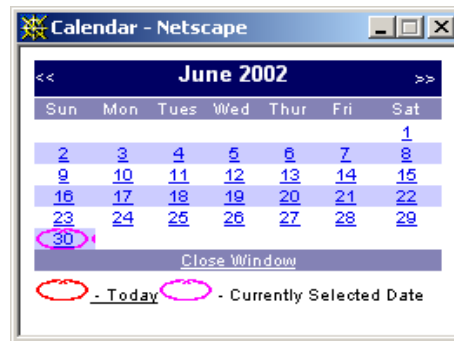
The screenshot shows a pull-down menu for the 'Purpose' field. The menu is open, displaying a list of options: 'CONFERENCE ATTENDANCE', 'MEETING', 'OTHER (see below)', 'PRESENTATION' (which is highlighted with a blue background), 'SITE VISIT', and 'TRAINING'.

3. **Description** is a free form text box in the **Trip Information** area used to further describe the travel purpose. It is important to enter a description of the trip in this field. Enter **Travel Manager presentation in Wash, DC**, in the **Description** text box.

4. Select **Single** from the **Type** pull down list.



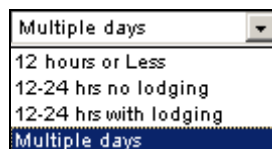
5. Enter the **Begin Travel** and **End Travel Dates: 06/30/02 – 07/06/02** (the **Calendar** icon  may be clicked to select the appropriate dates for both the **Begin** and **End Travel** dates. Click on the desired date in the calendar and the date field will automatically be filled with the selected date).



6. Select **Residence, USA** from both the **Depart Selection** and **Return Selection** pull down lists.



7. Notice that **Multiple Days** has automatically been selected in the **Trip Duration** pull down list. (Multiple Days will default for any trip greater than 2 days.)



8. Click the  button, beside the **Comment** field in the **Departure and Return Information** area, to fill the **Comments** field with the preset comments.

9. Click the **Add Location** button, in the **Per Diem Locations** area in the bottom right, to add a location. The **Add Per Diem Location to Trip** page is displayed.

The screenshot shows the 'Add Per Diem Location to Trip' page. The sidebar on the left lists navigation options: Document Summary, Traveler, Itinerary (selected), Ticketed Trans, Expenses, Lodging/M&IE, Accounting, Totals, Comments, Document Status, Perform Pre-Audits, Preview Document, Export Document, and Close Document. The main content area has a 'Quick Tip' box stating: 'Type the per diem location and click the Per Diem Location button.' Below this are input fields for 'Arrival Date' (06/30/2002), 'Departure Date' (07/06/2002), and 'Per Diem Location'. There are also links for 'Search' and 'Lookup'. Below the 'Per Diem Location' field are three dropdown menus: 'Unlisted Location' (with a checkbox), 'Select Unlisted State', and 'Select Per Diem Location'. The right sidebar contains a 'For this Document you can:' section with buttons for 'Save Location' and 'Close without Saving Location'.

10. Click in the **Per Diem Location** field and type **wash** (for Washington, DC).
11. Click the **Search** link beside the field. The **Per Diem Location** and **Select Per Diem Location** fields will be filled. Washington, DC, is displayed in both fields.

NOTE

*Make sure to check the **Select Per Diem Location** field to ensure the desired location has been displayed. There may be more than one State or Country with the same or similar location name. If more than one location is listed in the **Selected Per Diem Location** field, select the correct location from the list. The **Per Diem Location** field will automatically be filled with the selected location.*

12. Click the **Save Location** button in the 'For this Document you can:' area in the top right. The **Itinerary** page will be displayed again showing Washington, DC, as the location for the trip from 06/30 – 07/06 in the Per Diem Locations area.

Itinerary Information for 24-063002AT

Quick Tip
The Begin Travel and End Travel fields must be completed before a per diem location can be added. Remember to save your itinerary before continuing.

For this Document you can:

Trip Information

Travel Authorization Number: [Field]
 Purpose: PRESENTATION
 Description: [Field]
 Auth Date: 06/25/2002
 Type: SINGLE
 Trip No: 1

Departure and Return Information

Begin Travel: 06/30/2002
 End Travel: 07/06/2002
 Depart: RES: Residence, US
 Return: RES: Residence, US
 Depart Selection: RES: Residence, US
 Return Selection: RES: Residence, US
 Trip Duration: Multiple days
 Comments: Voucher due 5 days after completion of your trip.

Per Diem Locations

☐ Replace ALL lodging and M&IE information on this document.

Edit/Delete	Arrival Date	Location	Departure Date
	06/30/02	WASHINGTON, DC	07/06/02

13. Click the **Save Itinerary** button in the 'For this Document you can:' area in the top right. The document will be saved to the database and will be redisplayed.
14. Click the **Close Document** link, on the Document Processing Toolbar on the left side of the page, to close the document.
15. Alert the Preparer that the document has been created with the appropriate Itinerary so the Authorization can be completed.